

WHAT TRUSTED SERVANT EXPENSES ARE AUTHORIZED FOR REIMBURSEMENT?

Question – Will District 10 reimburse in whole or in part Trusted servant expenses related to their attendance at an “AA event” that is not a “service function” or a “service event”, and that is not otherwise within the general service structure? What if the “AA event” in question includes workshops, speakers, panels, or other activities directly related to their service position?

Written Guidelines – District

- The District Treasurer approves all disbursements according to the district conscience. ⁱ
- Standing committee chairpersons are responsible for ...monthly committee meetings and they should attend their respective area quarterlies. ⁱⁱ
- Approved annual budgets – traditionally for use with printing, mailing, and for costs to attend respective quarterlies; and for DCM/Alt DCM to attend Area Assembly

Written Guidelines – Area/GSO

- The Area 72 Handbook explicitly states what expenses are authorized for Area Trusted servants, with slight variations dependent on the position. In general, attendance at area quarterlies and Area Assembly are included, along with communications expenses such as printing & mailing. No position is authorized reimbursement for an AA “event”, i.e., a non-service function, except the Delegate. ⁱⁱⁱ
- The Area 72 Handbook does allow for certain committee chairpersons to attend national workshops that support their trusted servant responsibilities IF the workshop is both national in scope *and* has GSO participation – an example of this is the national corrections workshop.
- Groups provide financial support for their GSR’s attending “service functions.” ^{iv}
- Districts reimburse DCM’s TS’s for “attendance at service events” ^v

Precedent – District

- No evidence or testimony of past Trusted servants has been found for reimbursement of expenses to attend an AA event that is not specifically a service event or function.
- It has been understood albeit not put down in writing that district TS budget amounts are allocated for communications expenses and attendance at service functions (business quarterlies and Area Assembly)

Concepts & Traditions Applications

- Tradition Two – Bill W explained that evolving from Tradition Two is the element of trust, and “that we need not have the slightest fear of granting this indispensable privilege at nearly every level of world service.” Without this trust we “will wind up leaderless.” ^{vi}
- Concept III (Right of Decision) – “We ought to trust our...leaders to decide, within the framework of their duties, how they will interpret and apply their own authority and responsibility to each particular problem or situation as it arises.” (Twelve Concepts for World Service” p C10)
- Concept X (Service Responsibility Matched with Equal Service Authority) – “Let us be ...sure that all of our trusted servants have a clearly defined and adequate authority to do their daily work and to discharge their clear responsibilities.”

Concerns

- D10 budget could expand by as much as tenfold if all trusted servants attended non-service functions.
- 7th Tradition contributions could decrease if groups disapprove of our stewardship of their funds.

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Research Notes

Concept III – The Right of Decision – In *Twelve Concepts for World Service* on p. C11, Bill states, “Within the scope of their definitely defined or normally implied responsibilities, all [persons] should also be possessed of the right to decide when they will act wholly on their own and when they will refer their problems to the next higher authority.” (Note the “highest authority in A.A. is the group)

On the same page, Bill states his belief “that we should forthwith invest in all of our service bodies and people a traditional “Right of Decision.”

Also important are the concluding paragraphs on p. C11 explaining that this is not to be an excuse for proper reporting of *significant actions* or “as a reason for constantly exceeding a clearly defined authority, nor as an excuse for failing to consult” the appropriate persons “before an important decision or actions is taken.” (Note that there can often be an honest disagreement between people about what constitutes a “significant action.”)

On p. C10 Bill explains that evolving from **Tradition Two** is the element of trust, and “that we need not have the slightest fear of granting this indispensable privilege at nearly every level of world service.” Without this trust “will wind up leaderless.”

Service can be FUN. We can allow our TS’s the freedom to act confidently, whether that be by asking for full approval before taking an action or by acting independently when they feel it is appropriate or necessary. Being micromanaged is not fun.

We have the ultimate authority to remove someone from a position if they choose to abuse their delegated authority consistently or egregiously.

Concept X – Service Responsibility Matched with Equal Service Authority, p. C33, “Let us be ... sure that all of our trusted servants have a clearly defined and adequate authority to do their daily work and to discharge their clear responsibilities.”

Scope of authority can be defined by legal means, by traditional means, and “by principles under which ... doubtful or ... conflicting situations can be ... resolved.” p. C34

Frequent and transparent communication between trusted servants and the bodies they serve is a key to preventing or resolving most conflicts. Whenever possible, letting everyone who might be concerned about an issue beforehand is the best policy to follow. This also allows for a variety of input and comment before an action is undertaken. This input may change the course of the decision or action, as no one can think of every caveat on their own all the time. Seeking a multitude of wise counsel helps prevent unintended negative consequences.

“How do you know whether or not an event is an “**A.A.**” event? The criteria generally in place for an event to be considered “an A.A. event” is that it be put on by A.A.s, for A.A.s and about A.A.”^{vii}

An example of a conference would be PRAASA, an AA event mostly about service but is not part of the AA service structure like a quarterly or an assembly. We do, however, as an Area, fund one person to that event, the Delegate.

...for no stated AA purpose... beyond a prudent reserve...^{viii}

For our trusted servants we have stated purpose, to do their job, and implied purpose, within the guidelines of equal authority and equal responsibility. But there are some obvious boundaries that we’re OK with, like we wouldn’t be ok with someone saying that if they didn’t use all their budget that they could just take the balance

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out as cash at the end of the year, or just use the leftover budget amount for a personal vacation, etc. Where do we draw the line with reimbursement, what is acceptable and what isn't? How is this monitored? By the Treasurer, looking at receipts and reimbursement requests? If someone uses hybrid quarterly and has budget for going in person, can they use the extra funds in their budget to attend an AA event that includes content related to their service position? (As opposed to going to a Broadway or Las Vegas show totally unrelated to AA or AA service).

Basic group expenses "G.S.R. travel expenses to attend **service functions**"^{ix}.

What is the difference, if any, between an "**A.A. service function**" or "**A.A. service event**" and an "**A.A. event**"?

Conversation with Area Treasurer – "Not GSO sanctioned" (like not being described in SM as part of the general service structure)

Conversation with Area Alt Treasurer – referenced Area Handbook and budgets for various TS's, specified and unallocated in certain cases

The only specifically budgeted non-A.A. service functions are for the Delegate. However, 6 TS's have unallocated line that is discretionary, not enough for a fully paid trip to a distant event but could be used for partial reimbursement. Committee chairs do not have an unallocated budget line.

Committee chairs are authorized reimbursement for non-service functions that meet 3 criteria: 1. A National event; 2. GSO participation; 3. Supports that TS's responsibilities.

"Service events" – p 16, Service Manual, related to DCM expenses

Footnotes

ⁱ District 10 Handbook p 5

ⁱⁱ District 10 Handbook p 8

ⁱⁱⁱ Area 72 Handbook p 16-26

^{iv} F-3 pamphlet p.7; (Also see F-96 "Many groups provide financial support for their G.S.R.'s attending service functions.")

^v A.A. Service Manual, p 16

^{vi} Twelve Concepts for World Service" p C10

^{vii} A.A.® Guidelines Conferences, Conventions and Roundups MG-04

^{viii} 7TH Tradition (long form)

^{ix} F-3 pamphlet p.7; (Also see F-96 "Many groups provide financial support for their G.S.R.'s attending service functions." This same statement appears on p.22 pamphlet P-16).

Excerpts from Area 72 Handbook:

BUDGETED EXPENSES FOR AREA ELECTED OFFICERS: Expense reimbursements of elected trusted servants are broken down into three categories: meeting expense, communication expense, and unallocated budget line. **AREA 72 BUSINESS MEETINGS** Includes Pre-Conferences, Area Quarterlies, Pre-Assemblies, and Assemblies. Travel is reimbursed on the basis of actual mileage with the calculated mileage setting the allowable upper limit. Mileage is reimbursed at the current IRS business rate although the reimbursement form provides other rate options should servants choose to use them. ● Mileage and Travel Fees (i.e. Parking, Ferries, Tolls, etc.) ● Meals ● Lodging (This is paid in advance by the Alt. Treasurer) ● Registration (This is paid in advance by the Alt. Treasurer) **COMMUNICATION EXPENSES** Communications expenses are paid

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on the basis of bills submitted to the Area Alt. Treasurer. • Mail (postage) • General Supplies (Envelopes, photocopies, copy paper, ink etc.) (page 16 Area 72 Handbook)

BUDGET EXPENSES FOR AREA APPOINTED TRUSTED SERVANTS AND STANDING COMMITTEE CHAIRPERSONS Expense reimbursements for appointed trusted servants are broken down into four categories: meeting expense, communication expense, unallocated budget line, and allocated budget line. AREA 72 BUSINESS MEETINGS Includes Pre-Conferences, Area Quarterlies, Standing Committee Quarterly Meetings, and Assemblies. Attendance may also be requested at Pre-Conferences and Pre-Assemblies. Travel is reimbursed on the basis of actual mileage with the calculated mileage setting the allowable upper limit. Mileage is Page | 25 REVISED January 2023 reimbursed at the current IRS rate although the reimbursement form provides other rate options should servants choose to use them. • Mileage and Travel Fees (i.e. Parking, Ferries, Tolls, etc.) • Meals • Lodging (This is paid in advance by the Alt. Treasurer) • Registration (This is paid in advance by the Alt. Treasurer) COMMUNICATION EXPENSES Communications expenses are paid on the basis of bills submitted to the Area Treasurer. • Mail (postage) • General Supplies (Envelopes, photocopies, copy paper, etc.) ALLOCATED BUDGET Specific to Committee or position, not-to-exceed annual amount approved by the Area. Expenses will be reimbursed by the Area Alt. Treasurer. (page 25 Area 72 Handbook)

About ICYPAA from the ICYPAA Website

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"From time to time the General Service Office is asked if ICYPAA and young people's groups are "part of A.A." The answer is definitely yes. ICYPAA and its attendees are committed to reaching out to newcomers—no alcoholic is ever turned away, regardless of age—and to involvement in all facets of A.A. service. In most local A.A. meeting directories, young people's meetings are listed along with others, though in some areas asterisks may identify them as YPGs. Members of these groups often can be found serving at the national, state, area and group levels. ICYPAA conventions and conferences are vital A.A. activities and as such are listed in the Box 459 'Calendar of Events.'"

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The ICYPAA Advisory Council regularly contributes its excess funds to the General Service Office, Grapevine, and to fund other service projects.

ICYPAA was founded in 1958 for the purpose of providing a setting for an annual celebration of sobriety among young people in Alcoholics Anonymous. It's a weekend event that occurs once per year and consists of panels, workshops, and speaker meetings where recovering alcoholics can share their experience about getting and staying sober. Attendees of all ages come from across the globe to experience this truly remarkable gathering.

This information from ICYPAA tells us that ICYPAA is national in scope and does relate directly to the YPAA chairperson service position – those are 2 of the 3 criteria that Area 72 uses to determine if funding is authorized for Area 72 committee chairs to attend an AA event that is not strictly a "service function. The 3rd criterion is that the event includes participation by GSO, and while ICYPAA does not have direct participation by GSO at the event, but ICYPAA does maintain close communication with GSO and also "*regularly contributes excess funds to the General Service Office (GSO).*"